CHAPTER 11

WAIVER TRACKING SYSTEM PROCEDURES

Eligibility Inquiry

Before you can key in a budget for processing and approval, you must verify that the individual is enrolled in the Waiver. You should receive a copy of the enrollment letter from the Waiver Enrollments Coordinator. However, you can also go on the WTS and verify that enrollment is complete. To verify this information, follow these steps:

- Sign on to the WTS and proceed to the eligibility menu (**ENMEN**).

- Select **ENINS** and enter the individual's SSN in the Key 1 position.
    - There are three types of eligibility status: Pending DDSN **("P")**, Awaiting Finance Commission **("A"),** and Enrolled **("E").**
    - If an individual is **"E"** then he/she is enrolled in the Waiver and the budget can now be completed and approved (Eligibility can either be Current ("C") or Historical ("H")).
    - If an individual is **"A"** then he/she is awaiting enrollment from SCDHHS. However, this is only a data entry step. The budget can now be completed and approved (Eligibility can either be Current ("C") or Historical ("H")).

IF:	THEN:
Elig Status **E** and Curr/Hist C	Individual is currently enrolled in the waiver
Elig Status **A** and Curr/Hist C	Individual has fulfilled the requirements of Waiver eligibility and is only awaiting data entry by SCDHHS
Elig Status **P** and Curr/Hist C	Individual has fulfilled some requirements of waiver eligibility, but not all of them.
Elig Status (**E, A, or P**) and Curr/Hist H	Individual is terminated or current status has changed to A, P or E.

_*SCREEN ID*   *DESCRIPTION*   *REQUIRED*
ENUPD . . . . . .   UPDATE CURRENT ENROLLMENT   KEY1 F/C=A,C,D
ENLDT . . . . . .   UPDATE LAST LOC RE-EVAL DATE   KEY1
ENINQ . . . . . .   DISPLAY CURRENT ENROLLMENT   KEY1
ENINS . . . . . .   DISPLAY CURRENT AND HISTORICAL ENROLLMENT   KEY1
ENINA . . . . . .   INACTIVATE CURRENT ENROLLMENT   KEY1
ENREA . . . . . .   REACTIVATE CURRENT ENROLLMENT   KEY1

BDMEN . . . . . .   BUDGET MENU
DSMEN . . . . . .   DELIVERED SERVICE MENU
TAMEN . . . . . .   TABLES UPDATE MENU   _KEY LEGEND
TIMEN . . . . . .   TABLES INQUIRY MENU   KEY 1 - INDIVIDUAL"S ID OR
PRINT . . . . . .   PRINT MENU   LAST, FIRST NAME

MMENU . . . . . .   WVR MAIN MENU
STS   . . . . . .   SIGN ON TO SERVICE TRACKING SYSTEM
BYE   . . . . . .   SIGN OFF COMPLETELY

     .   NEXT SCREEN   ENINS   F/C _   KEY1 100000001

                                                                        XMIT _

INDIV. ID   100000001   NAME   JOE TEST

LEVEL OF CARE DATE	ENROLLMENT DATE	ENROLLMENT END DATE	ENROLLMENT STATUS	TRANSACTION DATE	CURRENT OR HISTORICAL
07-03-1997	09-27-1997	00-00-0000	E	10-01-1997	C
	09-27-1997	09-27-1997	A	09-29-1997	H
	07-01-1997	09-26-1997	P	09-29-1997	H

.   NEXT SCREEN   ENMEN   F/C   _   INDIV. ID   100000001

END OF DATA   XMIT _

Initiating a Budget

After you have verified that an individual is awaiting or enrolled, you can proceed with completing the budget. The first time an individual comes into the system, you have to go through the **budget initiation process**.

- Proceed to the Budget menu on the WTS (**BDMEN**).

- Selected **BDUPD, enter "A"** in the F/C field, and enter the SSN of the individual in the Key 1 position and Xmit.

- Key in the budget begin date which will be the enrollment date that can be located on your enrollment letter or on the enrollment screen of the WTS. In **most** circumstances this date is the individuals' LOC date.

- Once this step is complete you can key in your budget. **For every consumer in the Community Supports Waiver, the budget will not be allowed to exceed the fiscal year cost limit.**

Note you will only do this when completing the budget for the first time. You will not have to do this step again for the same individual unless they lose their Waiver slot, terminate, and then reapply. For subsequent years when the budget rolls over, you will not need to complete this step.

* SCREEN ID *	* DESCRIPTION *	* REQUIRED *
BDUPD ...……………	UPDATE BUDGETS ……………………………………………	F/C; KEY1
BDAPR ...……………	APPROVAL OF BUDGETS …………………………………	NONE
BDINQ ....……………	DISPLAY BUDGETS …………………………………………	KEY1
BDINA ....……………	INACTIVATE CURRENT BUDGET …………………………	KEY1
BDREA ..……………	REACTIVATE MOST RECENT BUDGET …………………	KEY1
BDCOM ……………	COMMENTS ON INDIV`S BUDGETS ……………………...	KEY1

SSUPD ……………	UPDATE SCHEDULED SERVICES………………………..	KEY1
ENMEN ……………	ENROLLMENT MENU	
DSMEN ……………	DELIVERED SERVICES MENU _KEY LEGEND	
TAMEN ……………	TABLE UPDATE MENU F/C - A(ADD),C(CHANGE),D(DELETE)	
TIMEN ……………	TABLE INQUIRY MENU KEY1- INDIVIDUAL`S ID OR	
PRINT ……………	PRINT MENU LAST, FIRST NAME	
MMENU ……………	WVR MAIN MENU	
STS ……………	SIGN ON TO SERVICE TRACKING SYSTEM	
BYE ……………	SIGN OFF COMPLETELY	

          NEXT SCREEN   BDUPD   F/C   A   KEY1   100000001

                                                                    XMIT _

INDIVIDUAL'S ID: 100000001   NAME: JOE TEST
    APPROVED BUDGET   8162.40   TYPE WAIVER C
    ESTIMATED BUDGET   8162.40

BUDGET DATA   C

    BUDGET BEGIN DATE ……………………..   07012008   (MMDDYYY)

    BUDGET END DATE……..………………   06302009

    APPROVAL LEVEL ………………………...

    PRIOR MEDICAI ADMISSION ……….……   NO   PROVIDER ……   236

                                                    ENTER "C" TO CANCEL   __

    NEXT SCREEN   BDMEN   F/C ___   KEY1   100000001
                                                            XMIT _

Budget Completion

Prior to completing a budget, you must first ensure that all services are included on the STS. If the services are not already on the STS you <u>cannot</u> add them to the WTS. **In addition, all services in the Community Supports Waiver are "S" codes.** Therefore, if a consumer is transferring from a day program that has an "A" code, the "A" code day service must be terminated in STS and the new "S" code day service must be added before the service can be entered into the budget.

Once these changes have been made, you can proceed with the budget completion.

- Proceed to the budget menu (**BDMEN**) on WTS.

- Select **SSUPD**, enter "C" in the F/C field, and enter SSN in Key 1 position.

- Select a contract period/budget by typing an "X", tab to Xmit field, and xmit. Typically there will only be the current budget listed. (However, at the end of the contract period when you are closing out the old year and you have access to the new contract period, you will have a choice of two budgets).

- To add a service to the budget, tab to the Xmit field on the **SELECT SCHEDULED SERVICES** screen and press xmit.

Proceed to key in the information regarding each individual service on the **UPDATE SCHEUDLED SERVICES** screen.

Note: It is essential at this point to use the tab key to guide you through each section as opposed to using your mouse.

- **Program Number**: This is the number that uniquely identifies each program. The program number is a combination of the type of service, service code, provider number and program sequence number. The service must be on the STS before trying to add it to the budget.
  - When you are adding a support service (i.e. PCA, Specialized Equipment/Supplies, psychological services) you only need to key in an **"S"** for support along with the program number (i.e. specialized equipment/supplies is S21) from the Community Supports Waiver Rate Table.

- **Service Name**: This field should be left blank.

- **The Begin Date and End Date**: this is the contract period which will typically be the current fiscal year such as 07012008-06302009, unless you are keying in a new budget. In that case, it will be the enrollment date that you used initializing the budget. The end date will always be June 30.

- **Actual End Date**: This field should be left blank.

- **Estimated time period**: place a "Y" for year.

- **Estimated units**: This is the number of units that you anticipate the individual will use during the contract period. If you are keying services and you are starting in the middle of a contract period, you are going to need to calculate the units starting from the budget begin date to June 30 for the year. In order to determine the units equivalence, refer to your Community Supports Waiver Rate Table where you will find all support services (i.e. psychological services one unit = 30 minutes; PCA one unit = 15 minutes).

  Please note: when adding services, you need to take into account an individual that often goes on vacation with family. If you know for certain that an individual is going to be gone during certain times of the year, you need to account for this in your budget and not include units during this time.

  - The exception to this rule is when you are keying in specialized equipment/supplies, environmental modifications, and private vehicle modifications. When keying in these particular services you will need to put 1 unit in the **Estimated Units** field and then key in the total cost in the **Estimated Total Cost** field. If you are asking for numerous items under Specialized Equipment/Supplies, you would include the grand total. You would not add each specific item.

- **Estimated Total units**: This field cannot be entered on this screen. This is the expected total number of units of service to be provided to the individual throughout the budget period. The total is automatically calculated based on what has been entered for the estimated time period and estimated units when the service is approved.

- **Estimated Total Cost**: This is the expected total cost of the service for the entire budget year. This amount will be calculated using the rate from the rate table. This field cannot be entered on this screen unless you are adding specialized equipment/supplies, environmental modifications, or private vehicle modifications (as previously noted).

- **Override rate**: This field cannot be completed by a normal user.

- **Direct billed "D" or Board provided "M"**: Direct billed means that the service is to be billed directly to Medicaid (SCDHHS) who will then pay the provider. Board billed means that the DSN Board will be billed for the service. You will determine this by referring to the Community Supports Waiver Rate Table and following the guidelines at the bottom of the table.

- **Service Description**: Typically you will need to type more than one sentence regarding the service you are requesting. In these circumstances, you would need to place the following statement in the field: "**See BDCOM for comments**". The **BDCOM** option is an area that you can use to add comments when you need to justify a service. The only time you would probably not need to use **BDCOM** would be when adding a simple service that requires little justification such as day services.

- **Do you wish to update services again?**: After the screen is completed you can choose to add another service by entering a "Y" which will return you to the **SELECT SCHEDULED SERVICE** Screen or "N" which will return you to the **Budget menu**. Tab through the Cancel field, and xmit.

- If you chose to add additional services, the system will return you back to the **SELECT SCHEDULED SERVICES** screen and you would proceed as previously stated.

Once you have completed your initial budget, you will need to proceed to the **PRINT MENU** and print the **WVR450** report. Refer to instructions for printing waiver budgets and revisions for all details.

WAIVER BUDGET
SELECT BUDGET   HELP ___

INDIVIDUEL'S ID   100000001   NAME JOE TEST

BEGIN DATE	END DATE	PROVIDER NAME	PROVIDER NUMBER	SELECT ("X")
07012008	06302009	NO NAME PROVIDER.	###	X
_____				__
_____				__
_____				__
_____				__

ENTER "C" TO CANCEL _

XMIT _

END OF DATA

WVR010SSINT   SELECT SCHEDULED SERVICES   HELP __

INDIVIDUAL'S ID   100000001   JOE TEST

BUDGET BEGIN DATE   07/01/2008   BUDGET END DATE   06/30/2009

APPROVED BUDGET   8162.40   ESTIMATED BUDGET   8162.40

TYPE WAIVER C   APPROVAL TYPE   CSW

				BILL	
PROGRAM#	DESCRIPTION	BEGIN DATE	END DATE	IND	F/C
S2100000	SPECIALIZED EQUIP/SUPPLIES	07/01/2008	06/30/2009	D	_
S1000000	PERSONAL CARE II	07/01/2008	06/30/2009	D	_
S2600000	ENVIRONMENTAL MOD	07/01/2008	06/30/2009	D	_
_____					
_____					
_____					
_____					
_____					
_____					
_____					

  * TO ADD A RECORD DO NOT ENTER A F/C FOR ANY RECORD
    ELSE ENTER C(CHANGE), D(DELETE), N(INACTIVATE)

                                        ENTER "C" TO CANCEL _

END OF DATA   XMIT _

WAIVER SYSTEM

WVR010SSUPD   UPDATE SCHEDULED SERVICES   HELP ___

INDIVIDUAL'S ID   100000001   JOE TEST
BUDGET BEGIN DATE 07/01/2008   BUDGET END DATE   06/30/2009
APPROVED BUDGET 8162.40   ESTIMATED BUDGET   8162.40
FY COST LIMIT 10000.00   TYPE WAIVER C   APPROVAL TYPE   CSW
PROGRAM # S21_____   SERVICE NAME _____

BEGIN DATE 07012008   END DATE 06302009   ACTUAL END DT _____

ESTIMATED TIME PERIOD   Y (D,W,M,Y)   CURRENT TIME PERIOD   _
ESTIMATED UNITS   1   CURRENT UNITS   _____
ESTIMATED TOTAL UNITS   1   CURRENT TOTAL UNITS   _____
ESTIMATED TOTAL COST   3500.00   CURRENT TOTAL COST _____

OVERRIDE RATE N   D   DIRECT BILLED "D" OR
                                              BOARD PROVIDED "M"

SERVICE DESCIPTION
SEE BDCOM FOR COMMENTS _____

DO YO WISH TO UPDATE SERVICES AGAIN? _   ENTER "C" TO CANCEL _

                                              XMIT _

WAIVER SYSTEM

WVR010SSUPD   UPDATE SCHEDULED SERVICES   HELP ___

INDIVIDUAL'S ID   100000001   JOE TEST
BUDGET BEGIN DATE 07/01/2008   BUDGET END DATE   06/30/2009
APPROVED BUDGET 8162.40   ESTIMATED BUDGET   8162.40
FY COST LIMIT 10000.00   TYPE WAIVER   C   APPROVAL TYPE   CSW
PROGRAM # S21   SERVICE NAME _____

BEGIN DATE 07102008   END DATE 06302009   ACTUAL END DT _____

ESTIMATED TIME PERIOD   Y (D,W,M,Y)   CURRENT TIME PERIOD   Y
ESTIMATED UNITS   1   CURRENT UNITS   1
ESTIMATED TOTAL UNITS   1   CURRENT TOTAL UNITS   1
ESTIMATED TOTAL COST   3500.00   CURRENT TOTAL COST 3500.00

OVERRIDE RATE N   D   DIRECT BILLED "D" OR
                                          BOARD PROVIDED "M"

SERVICE DESCIPTION
    ROLLOVER FROM FISCAL YEAR 2008

DO YO WISH TO UPDATE SERVICES AGAIN? _   ENTER "C" TO CANCEL _

                                                        XMIT _

Adding Comments

To add comments
- Return to the budget menu (**BDMEN**)

- Key in **BDCOM**, place a "C" in the F/C field, and SSN in the key 1 position.

- Select a contract period/budget by typing an "X", tab to Xmit field, and xmit. Typically there will only be the current budget listed. (However, at the end of the contract period when you are closing out the old year and you have access to the new contract period, you will have a choice of two budgets). You will be presented with the **COMMENT SELECTION** screen.

- To enter comments, tab to xmit field, xmit, and proceed with typing in your comments to justify the services that you have requested.

- If you need more than one page for the comments, type "Y" beside **Continue Same Comments?**, tab to the Xmit field and xmit.

- When you are finished with the comments, type "N" beside **Continue Same Comments?**, tab to the Xmit field, and xmit.

To change a comment
- Type "X" beside the comment to be revised on the **COMMENT SELECTION** screen, tab to the Xmit field and press xmit.

- On the **COMMENTS** screen, make the needed updates

- Type "Y" or "N" to continue the same comment and xmit.

Note: You can only update comments that you have made.

To read a comment written by someone else,
- Type "X" beside the comment you wish to view on the **COMMENT SELECTION** screen, tab to Xmit field and press xmit.

- The selected comment will be displayed.

- After viewing the comment, tab to the Xmit field and press xmit to return to the **BDMEN** menu.

ID: 100000001 _   NAME: JOE TEST

PLACE AN "X" BESIDE THE DESIRED RECORD TO UPDATE/INQUIRE OR XMIT TO ADD
A NEW RECORD

					SELECT
TRANS DATE	HH	MM	SS	ENTERED BY USER	"X"
_____	__	__	__		__
COMMENT 1ST 50 CHARACTERS					
_____	__	__	__		__
COMMENT 1ST 50 CHARACTERS					
_____	__	__	__		__
COMMENT 1ST 50 CHARACTERS					
_____	__	__	__		__
COMMENT 1ST 50 CHARACTERS					
_____	__	__	__		__
COMMENT 1ST 50 CHARACTERS					

                                                          CANCEL __

                                                             XMIT __

END OF DATA

WVR010BDCOI   COMMENT SELECTION   HELP __

ID: 100000001 _   NAME: JOE TEST

PLACE AN "X" BESIDE THE DESIRED RECORD TO UPDATE/INQUIRE OR XMIT TO ADD
A NEW RECORD

                                                                 SELECT
TRANS DATE   HH   MM   SS   ENTERED BY USER   "X"
 08212008   18   07   17   USER'S NAME   __
COMMENT 1ST 50 CHARACTERS   JOE NEEDS $160.35 OF AT FOR REPAIRS TO HIS RIFTO
_____   __   __   __   __
COMMENT 1ST 50 CHARACTERS
_____   __   __   __   __
COMMENT 1ST 50 CHARACTERS
_____   __   __   __   __
COMMENT 1ST 50 CHARACTERS
_____   __   __   __   __
COMMENT 1ST 50 CHARACTERS
                                                         CANCEL __

                                                         XMIT __

END OF DATA

ID: 100000001 _   NAME: JOE TEST

COMMENT: PAGE 1
JOE NEEDS $160.35 OF AT FOR REPAIRS TO HIS RIFTON CHAIR. THE CHAIR IS
NEEDED FOR THERAPEUTIC POSITIONING. THE REPAIRS WILL INCLUDE REPLACING THE
ARM REST AND ADDING A WRIST STRAP TO SECURE JOE'S HANDS.

>

CONTINUE SAME COMMENTS?   N   (Y/N)

CANCEL __

XMIT __

Printing Budgets and Revisions on the Waiver System

- From the Main Menu or Budget Menu (**BDMEN**) select **PRINT,** tab to xmit, and xmit.

- Select **RPTGP**, tab to xmit, and xmit.

- Type "X" beside **WAIVER BATCH REPORTS**, tab to xmit, and xmit.

- Type "X" beside the specific report that you wish to print, tab to the Xmit field and xmit.

- For the current, **<u>approved</u>** budget print **WVR310.**

- For an initial budget or budget revision print **WVR450.**

These two commands will take you to a screen where you will provide information regarding the individual.

See attached pages for examples.

    TRANSACTION   DESCRIPTION
        RPTGP …………………   LISTS THE DIFFERENT GROUPS OF WVR REPORTS

    MMENU ………………   MAIN MENU
    STS   ………………   SIGN ON TO STS
    MARC   ………………   SIGN OFF TO MARC SCREEN
    BYE   ………………   SIGN OFF COMPLETELY

NOTE: YOU MAY ALSO REQUEST ANY OTHER MENU WITHIN THE WVR SYSTEM.
      .   TRANSACTION   _____

                                                              XMIT __

* Development Version *

GROUP	DESCRIPTION	SELECT (X)
01	WAIVER BATCH REPORTS	_
02	FISCAL ONLY REPORTS	_
03	PROVIDER SPECIFIC REPORTS	_
04	FUNDING BAND AND HOM BOARD DATA	_
05	SURB GROUP	_
__		_
__		_
__		_
__		_
__		_
__		_
__		_
__		_

ENTER "C" TO CANCEL _

XMIT _

END OF DATA

GROUP   01   -   WAIVER BATCH REPORTS

		SELECT
FUNCTION	REPORT DESCRIPTION	(X)
WVR300	TOTALS BY PROVIDER AND PROGRAM ……………………………	_
WVR310	COST SCHEDULE OF WAIVER SERVICES BY INDIVIDUAL……	_
WVR370	PROVIDER SUMMARY REPORT ……………………………………	_
WVR390	REGIONAL / STATEWIDE SUMMARY ……………………………..	_
WVR400	CONSISTENCY REPORT …………………………………………..	_
WVR450	REPORT OF PROPOSED BUDGETS AWAITING APPROVAL ……	_
_____		_
_____		_
_____		_
_____		_
_____		_

ENTER "C" TO CANCEL _

XMIT _

END OF DATA

FUNCTION   WVR310   COST SCHEDULE OF WAIVER SERVICES BY INDIVIDUAL
PRINTER NUMBER……………………………. u893   CENTRAL OFFICE - COLUMBIA
USE PITCH SET UP FOR REPORT?   N   (Y,N)
ENTER ALL OF THE FOLLOWING PARAMETERS:

01	ENTER TYPE WAIVER: (M - MR/RD, H - HASCI, C - CSW) ………	C_____
02	ENTER FISCAL YEAR: (YYYY) …………………..………………	2009_____
03	ENTER 1 OF THE FOLLOWING - INDIVIDUAL'S ID: ………………	100000001___
04	PROVIDER # OR "ALL":…………	_____
05	-SUMMARY ONLY? (Y): ………	_____
06	REGION: (2, 3, 4, OR 6): …………	_____
		_____
		_____

This report allows the user to enter two lines of
Comments if needed:

_____
_____

RETURN TO THIS SCREEN   _ (Y,N)   ENTER "C" TO CANCEL   _
PRINT   WVR   01
                                                          XMIT _

WVR099PARM1   REPORT PARAMETERS   HELP __

FUNCTION   WVR450   REPORT OF PROPOSED BUDGETS AWATING APPROVAL

PRINTER NUMBER……………………………. u893   CENTRAL OFFICE - COLUMBIA

USE PITCH SET UP FOR REPORT?   N   (Y,N)

ENTER ALL OF THE FOLLOWING PARAMETERS:

   01   ENTER APPROVAL LEVEL: (1-4) …………………………………… 1 _____

   02   ENTER 1 OF THE FOLLOWING - INDIVIDUAL'S ID: ……………. 100000001___

   03   PROVIDER # OR "ALL":………… _____

   04   REGION: (2, 3, 4, OR 6): ………… _____

                                                         _____

                                                         _____

                                                         _____

                                                         _____

          _____

          _____

        RETURN TO THIS SCREEN   _ (Y,N)   ENTER "C" TO CANCEL   _

     PRINT   WVR   01

                                                          XMIT _

Budget Approvals

When you complete an Initial Waiver budget or Waiver budget revision, you must submit the **WVR450 Report** to your Supervisor for approval. Given certain parameters set-up within the system, some requests can be approved at the local provider level. Other requests will forward to CO for approval. Given the circumstance, your supervisor will return your request with a statement regarding approval. If your request went to CO, it is your responsibility to inquire regularly to see if your request has been approved. You will also want to check the **Comments** section frequently. There are certain circumstances when CO personnel might wish for additional information before approving your request. They will not E-mail you or call you; they will use the system to type in comments for your review. If their comments are ignored for several days, they will typically deny the request and you will have to start the process over again.

Verification of budget approval can be accomplished with the following steps.

- Go the budget menu (**BDMEN**)
- Select **BDINQ,** place a "C" in the F/C field, and include the SSN in Key 1 position.
- On the **BUDGET RECORDS** screen select the budget which you want to inquire with an "X", tab and xmit.
- As was represented on **WVR450** Report you will see **approved budget** and **estimated budget**. If these numbers match, you can typically assume that your request has been approved. However, when doing a budget revision to change an already existing service, the units could match, but your service **may** actually be denied. It is every important that you refer to your **WVR450** report to verify the specific number of units or funding approved is the same that you requested (For example, the budget already reflected 24 units of daily respite. You added 12 more units to total 36 units. You check the BDINQ screen and see 24 units as the estimated amount and the approved amount. Given this information you would determine that you request had been denied.)

Completing a Budget Revision

Prior to completing a budget, you must first ensure that all services are included on the STS. If the services are not already on the STS you <u>cannot</u> add them to the WTS. In addition, all services in the Community Supports Waiver are "S" codes. Therefore, if a consumer is transferring from a day program that has an "A" code, the "A" code day service must be terminated in STS and the new "S" code day service must be added before the service can be entered into the budget.

- Proceed to the budget menu (**BDMEN**) on WTS.

- Select **SSUPD**, enter "C" in the F/C field, and enter SSN in Key 1 position.

- Select a contract period/budget by typing an "X", tab to Xmit field, and xmit. Typically there will only be the current budget listed. (However, at the end of the contract period when you are closing out the old year and you have access to the new contract period you will have a choice of two budgets).

- To add a new service that does not currently exist to the budget, tab to the Xmit field on the **SELECT SCHEDULED SERVICES** screen and press xmit. You will proceed in the same manner as when you completed a new budget.
  OR
- To make a change to a service already included on the budget, place a "C" by the service you wish to change, tab to xmit, and xmit.

- Tab to the **ESTIMATED UNITS** and enter the change.
  - If you are adding additional services you will add the number of additional units to what is already approved and include the total (i.e. 20 units of psychological services approved; 15 more needed; the amount keyed in would be 35 units). If you are deleting units, you will reduce the current approved amount to the desired amount. When adjusting specialized equipment/supplies, environmental modifications, or private vehicle modifications, you will tab to the ESTIMATED TOTAL COST and make adjustments in the same manner.

If you are deleting all units of a particular service on the budget you follow these steps:

- Proceed to the budget menu (**BDMEN**) on WTS.

- Select **SSUPD**, enter "C" in the F/C field, and enter SSN in Key 1 position.

- Select a contract period/budget by typing an "X", tab to Xmit field, and xmit. Typically there will only be the current budget listed. (However, at the end of the contract period when you are closing out the old year and you have access to the new contract period you will have a choice of two budgets).

- To delete an entire service place a "D" beside the service in the F/C field, tab, and xmit on the **SELECT SCHEDULED SERVICES** screen. The system will automatically place your cursor at the **<u>Do you wish to update services again?</u>** Field. Place a "N" here, and proceed to the **Cancel Screen field**, where you will place a "D", tab to xmit, and xmit. This process will delete the entire service from the budget.

As when you completed a new budget, you will need to print the **WVR450** report and submit to your supervisor for approval. Once you have received approval of the service you will need to print the **WVR310** and attach to your budget revision in your file in the designated area according to the Waiver Index.

If you only deleted a service, you do not need to submit the request to your Supervisor. You will only need to print a copy of the new, approved budget (**WVR310**) and file in the appropriate area of your file.

Note: When doing a revision, you do not make any changes to any other areas of the **UPDATE SCHEDULED SERVICES screen other than the above stated areas.**

To Inactivate a Budget

If for some reason an individual looses their Waiver slot, the budget must be inactivated and the individual must be disenrolled from the Waiver.

All services <u>must</u> be reconciled to reflect the actual usage through the **SSUPD** screen before inactivating the budget. **This is very important in the Community Supports Waiver due to the fiscal year cost limit.** If the budget has not been reconciled and the consumer comes back into the program a few months later, the consumer may not be able to receive as many services do to the previous budget being overstated. **The consumer can not have more services than the fiscal year cost limit allows.** The STS should also be updated to reflect transfers and/or discharges. Once you have completed these steps, please follow these procedures:

- Proceed to the budget menu (**BDMEN**).
- Select **BDINA**, key "C" in F/C position, and SSN in key 1 position and xmit.
- Select the budget, which you need to access by placing a "X" in the appropriate field, tab to the xmit field and press xmit.
- Key in the actual end date, which will be the date of disenrollment or the date the individual moved to a new county.
- Key in whether the budget has been adjusted - Y for yes or N for no.

If the individual is moving to another provider, you must also contact the Cost Analysis Division at Central Office to request a provider transfer.

For individuals who will no longer be receiving the Waiver, complete the Waiver Disenrollment Form after the budget has been inactivated. Copies of the form should be sent to the District Office. The Waiver Enrollments Coordinator will terminate the Waiver enrollment. If the individual is **also** being closed on the STS, <u>**the waiver enrollment must be terminated before the closure can be completed.**</u>

WVR010BDINA   INACTIVATE BUDGET   HELP __

INDIVIDUAL'S ID: 100000001
INDIVIDUAL'S NAME: JOE TEST   TYPE WAIVER   C

BUDGET DATA   >

    BUDGET BEGIN DATE ………………………........................ 07012008   (MMDDYYYY)

    BUDGET END DATE …………………………………………… 06302009   (MMDDYYYY)

    ACTUAL END DATE……………...……………………......... 02152009   (MMDDYYYY)

    BUDGET ADJUSTED …………………………………………..   Y_____   (Y OR N)

    PROVIDER …………………………………………….............   236_____

                                                       ENTER "C" TO CANCEL   __

        NEXT SCREEN   BDMEN   F/C ____   KEY1 100000001
                                                       XMIT _